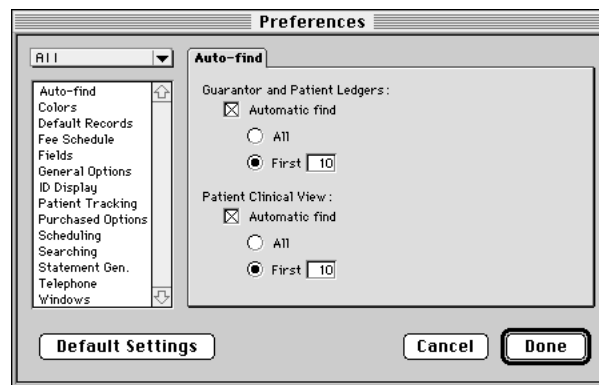


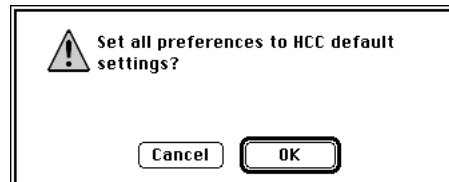
## chapter two

# preferences

**T**his chapter explains MediMAX's preferences, which affect the way MediMAX looks and operates. Each preference has pre-selected, default settings, but you may want to change these settings. Choose Edit→Preferences to display the Preferences dialog box.



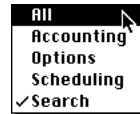
When you use this dialog box, the three buttons near the bottom are always available. Click the Done button to close the dialog box and activate any changes you've made to the preferences. Click the Cancel button to close the dialog box without activating any changes. The button in the lower-left corner, Default Settings, should be used with caution. Click this button to return every preference to its original configuration. When you click the Default Settings button, a dialog box displays.



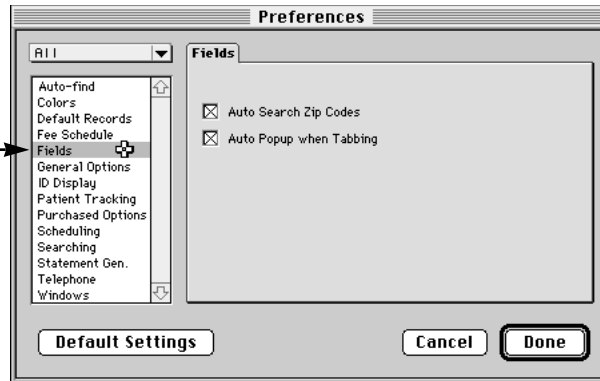
Click OK to confirm that you want to return all preferences to their default settings. Click Cancel to return to the MediMAX Preferences dialog box without resetting all of your preferences.

# chapter two

MediMAX has four preference categories. Use the pop-up menu in the upper-left corner of the Preferences dialog box to choose a preference category or choose All to list all of MediMAX's preferences.

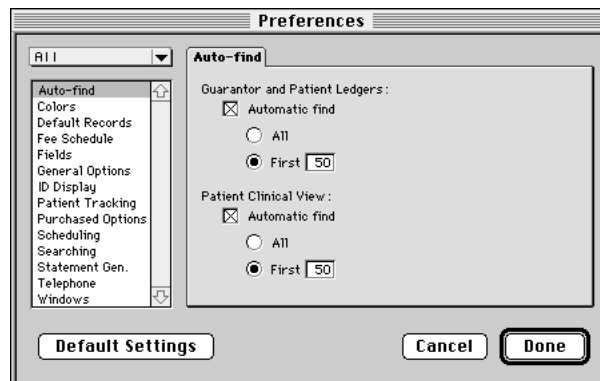


To use a preference, click its name. The selected preference displays to the right. You can also press your keyboard's up and down arrows to move through the list of preferences.



## auto-find preference

The Auto-find preference has one set of controls for the patient and guarantor ledgers and another identical set of controls for the patient's Clinical view.



Select an Automatic Find checkbox if you want to initiate an automatic search for list entries when you display ledgers or the patient's Clinical view. MediMAX uses the view's pre-defined search settings, which may or may not display the list entries you want to see. If the Automatic Find checkbox is not selected, no entries appear in the list until you define your search and click the Find button. Chapter Three, "Searching," explains how to define a search.

This preference also controls the number of matching entries MediMAX displays when these views are searched, regardless of whether the search is automatic. Select the All radio button if you want all matching entries to display when a search is performed. If you want to display matching entries in small batches, select the First radio button and enter a number in the field provided. For example, if you want MediMAX to display matching entries ten at a time, select the First radio button and type the number 10 in the field.

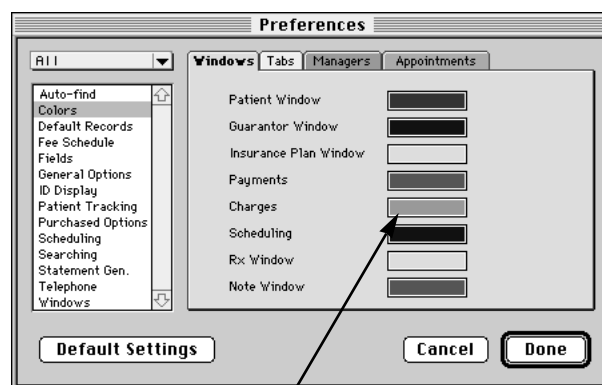
**Important:** Search speed increases when fewer matching entries are required.

# preferences

## colors preference

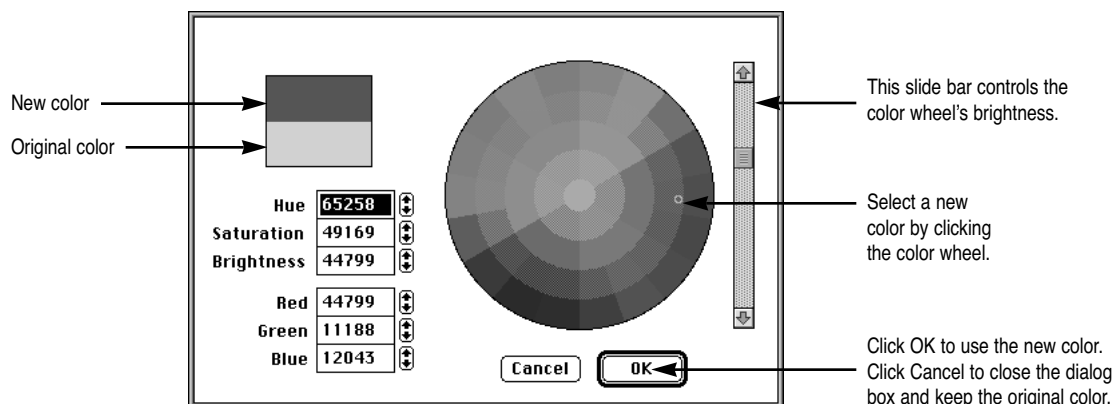
The Colors preference controls the color of action bars on windows and the color of overlapping tabs. When several windows are displayed or when a window has many tabs, colors provide a quick, visual way to locate the window you want. This preference has three or four tabs: one for setting the color of action bars on windows, another for specifying the color of tabs, a third for setting the color of action bars on MediMAX's manager windows, and if you purchased scheduling, a fourth for specifying appointment colors.

Eight types of windows are listed on the Windows tab, and each one has a color bar next to it. The color bar matches the color found on the corresponding window's action bar. To change a color, first click one of the color bars.



Click the color bar if you want to change the color.

A dialog box with a color wheel displays. Please note: If you use Apple's Color Picker extension, the controls on this dialog box are not exactly like those described below, but the basic principles of color selection are the same. Use the slide bar on the right side of the dialog box to change the color wheel's brightness. Click anywhere on the color wheel to select a new color. Another way to select a color is to enter Hue, Saturation, and Brightness values or Red, Green, and Blue values in the fields provided. Your selection appears above the original color in the upper-left corner of the dialog box. Click the OK button to change the color to your selection.



When a tab is active and the information it contains is available, the tab has a gray background, but inactive tabs are colored. Use this preference's Tabs tab to control the color of inactive tabs. The left tab in a stack of tabs is considered the first tab, the next tab to the right is the second tab, and so on. Click a color bar and use the color wheel that displays to select a color.

## chapter two



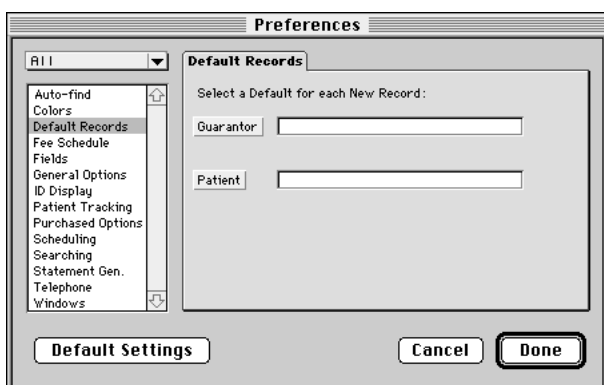
Use the Managers tab to determine the color of action bars on MediMAX's manager, reference, and DayView windows.

If you purchased scheduling, use the Appointments tab to assign colors to various types of appointments.



### default records preference

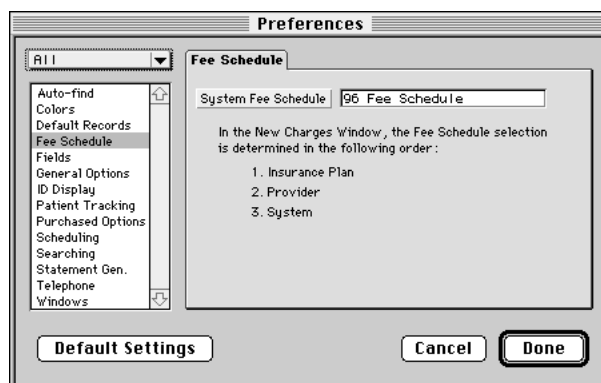
Chapter Four, "References," includes a discussion of the Default Patients and Default Guarantors references where you can create any number of default records. In the preference shown here, you select one default from each of these references. Click either the Guarantor or the Patient lookup and use the reference which displays to make a selection. New patient or guarantor records are based on the default record selected in this preference unless you use the search windows to specify that you want to use a different default. Chapter Three, "Searching," explains how to use the search windows to select different default records.



### fee schedule preference

A fee schedule is a list of procedures and corresponding fees. Medicare, HMOs, PPOs, and other insurance carriers often require that you use a specific fee schedule when submitting claims. Individual providers in your office may want to create personal fee schedules. You create fee schedules with the Fee Schedules reference and, indirectly, with the Master Procedures reference. See Chapter Four, "References," for a complete explanation of these two references.

Use the Fee Schedule preference to select a system fee schedule. When you post charges, MediMAX first determines whether the patient's insurance plan has an assigned fee schedule. If this is the case, the insurance plan's fee schedule is used to calculate charges. If the patient doesn't have insurance or if the insurance plan has no designated fee schedule, MediMAX checks to see if the patient is assigned a provider who has a personal fee schedule. If the patient has no fee schedule derived from an insurance plan or provider, the system fee schedule is used to calculate fees. Click the System Fee Schedule lookup, and then choose a fee schedule from the Fee Schedules reference.



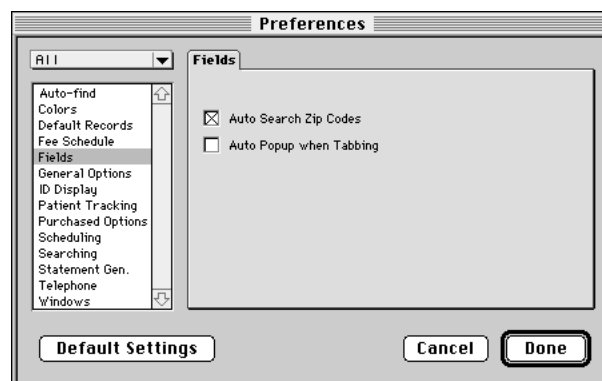
# preferences

## fields preference

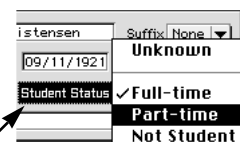
The Fields preference contains two checkboxes. Select the Auto Search Zip Codes checkbox if you want to generate an automatic search in the Cities reference whenever you enter a zip code. This means that by entering a zip code in any Zip Code field and then pressing your keyboard's Tab key or clicking another field, MediMAX searches the Cities reference. If the zip code is found, the corresponding city and state entries are automatically placed in their respective fields. If the zip code is not found, the Cities reference displays so you can create the entry. If the Auto Search Zip Codes checkbox is not selected, entering a zip code has no effect on the zip code's corresponding city or state fields.



With Auto Search Zip Codes selected, enter a zip code and press Tab to search your Cities reference for the corresponding entry.



Select the Auto pop-up when Tabbing checkbox if you want active pop-up menus to open automatically. If this checkbox is not selected, you can still display the contents of an active pop-up menu by clicking the pop-up menu or by pressing your keyboard's Down Arrow key. If you use this Auto pop-up feature or if you display a pop-up menu's contents by pressing the down arrow, use your keyboard's Up and Down Arrow keys to highlight the menu choice you want, and then press the Space bar to select the choice.



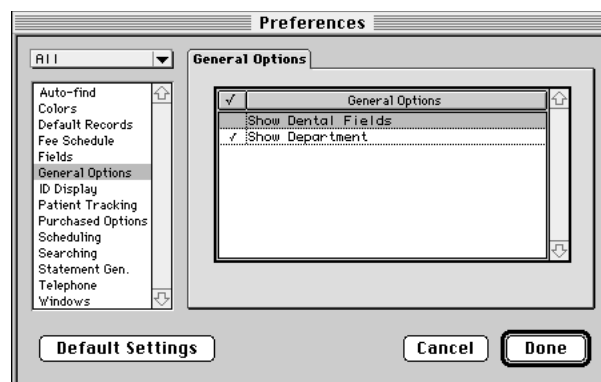
Auto pop-up causes active pop-up menus to open automatically.

## general options preference

The General Options preference has two options: Show Dental Fields and Show Department. A checkmark (✓) indicates that an option is selected. To select or deselect an option, click the line item. When selected, each option adds a field to the New Charge window. Chapter Eleven explains how to use the New Charge window.

Select Show Dental Fields to include tooth, surface, and quadrant information in the New Charge window and Appointment Card. Oral surgeons, periodontists, and maxillofacial surgeons need to record this information.

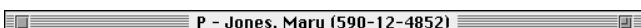
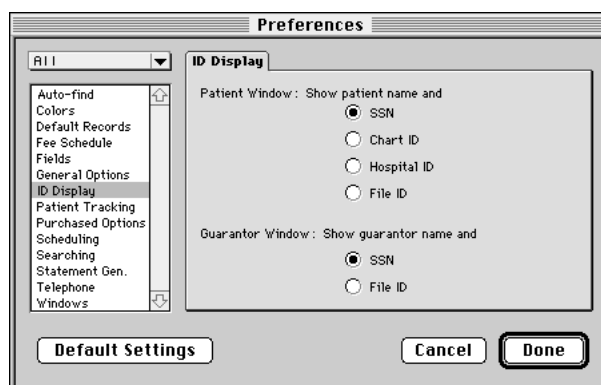
Select Show Department if you want to track production by department as well as by provider and location. This lets you measure the productivity of individual departments such as surgery, audiology, or radiology. This also lets you measure each provider's productivity in each department. To ensure the consistency of production reports, please decide which fields you want to include on the New Charge window before entering any charges, and then stick with your decision.



# chapter two

## ID display preference

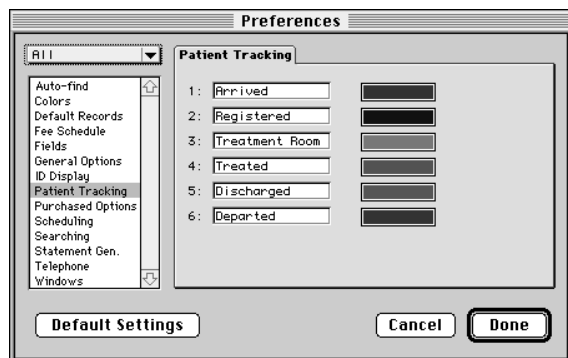
Use the ID Display preference to choose which identification numbers display next to the name on patient and guarantor records' title bars. Patient records are discussed in Chapter Five and guarantor records are discussed in Chapter Six. If you converted to MediMAX from MediMac 3.9.X software, the File ID field contains the patient or guarantor's MediMac account number.



A patient record's title bar when SSN is selected

## patient tracking preference

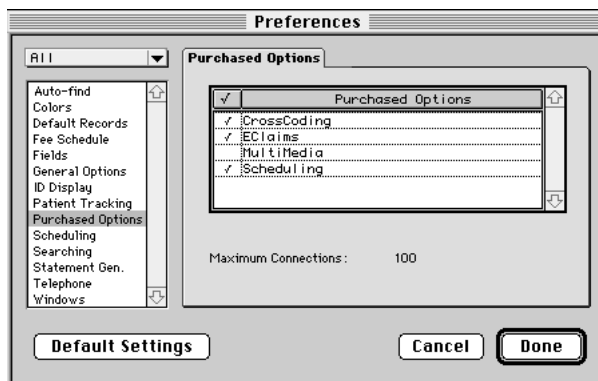
The DayView, which is explained in Chapter Sixteen, includes a tab for tracking each patient's progress through the office. You may want to record what time the patient arrives, when the patient enters the treatment room, and other stages of each office visit. Use the Patient Tracking preference to define up to six such stages. If you want to track only four office visit stages, for example, clear the entries from fields five and six. Empty fields in this preference do not appear on the DayView's Tracking tab.



As you record a patient's progress through the office, the current stage appears next to the patient's name in the DayView's list. The color next to each field in this preference determines the color of the text in the DayView list's Tracking column. Click a color bar and use the color wheel that displays to make a color selection. The text is easier to read in the DayView if you choose dark colors.

## purchased options preference

The Purchased Options preference lists several features that expand MediMAX's capabilities. Options with checkmarks next to them are active. This is a display-only preference that lists the purchased options enabled by your system administrator.

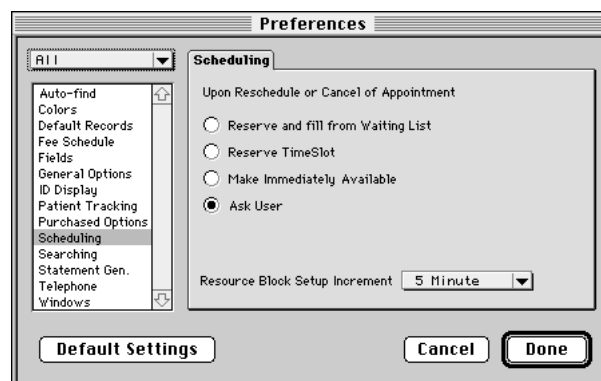


# preferences

## scheduling preference

If you purchased Scheduling, use the Scheduling preference to specify how rescheduled and cancelled appointments are handled by selecting one of the four mutually exclusive radio buttons. Also, please make a selection from the pop-up menu in the lower-right corner to establish the time units you use while creating resource schedules.

If you select the Reserve and fill from Waiting List button, the Waiting List dialog box displays immediately after you cancel or reschedule an appointment. Selecting a patient in this dialog box places them in the vacated time slot.



Select Reserve TimeSlot to reserve the time slot previously occupied by the cancelled or rescheduled appointment. The vacated time slot remains in the Appointment Book with the word *Reserved* on it until someone opens the time slot's Appointment Card and creates a new appointment.

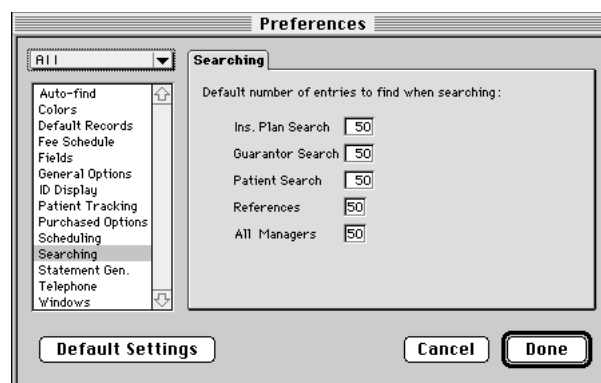
Select Make Immediately Available to clear the time slot and make it immediately available for scheduling.

If you select Ask User, a dialog box lets you choose what to do with the vacated time slot each time you cancel or reschedule an appointment.

## searching preference

Whenever you display a window or dialog box that contains a list, you need to perform a search to display the list's entries. After defining your search, you click a Find button to display a finite batch of matching entries. If additional matching entries exist, you may continue pulling batches of them into the list until the desired entry is available. The Searching preference is where you define the size of these batches.

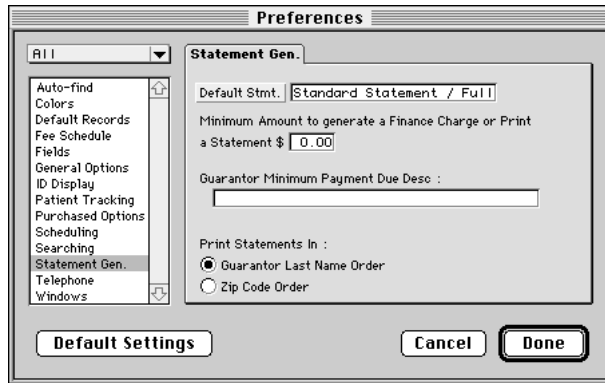
The top three items in this preference apply to the Insurance Plan Search window, the Guarantor Search window, and the Patient Search window. You may specify any number between 1 and 999 in each of these first three fields. The number in the References field applies to all references, and the number in the All Managers field applies to your manager windows. You may specify any number between 1 and 99 in these two Searching preference fields. For optimum speed, select a relatively small number.



# chapter two

## statement generator preference

Use the Statement Generator preference to select a default statement, to specify the minimum balance required to generate a statement or finance charge, and to set other default statement attributes.

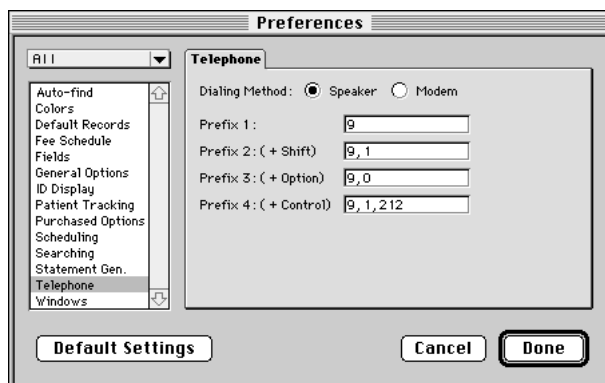


Click the Default Stmt. lookup and select your office's most frequently used statement from the Report Packages dialog box that displays. If necessary, choose Statements from the pop-up menu on the Report Packages dialog box to view the available statements. When you generate statements, MediMAX uses the default statement unless you select a different statement before printing or the patient's provider has selected a personal statement. Chapter Four includes a discussion of the Providers reference, where each provider can select a personal statement. Chapter Twenty-four explains how to use the Report Packages dialog box.

MediMAX generates statements or finance charges only when a guarantor's balance equals or exceeds the amount entered in this preference. For example, if someone owes less than a dollar, you may want to save the costs of printing and mailing a statement. These small, unpaid amounts remain in the guarantor's account without incurring finance charges or late charges.

The short message you type in the field labeled "Guarantor Minimum Payment Due Desc:" prints on statements along with the amount designated as a minimum payment for the person receiving the statement. Chapter Six, "Guarantor Records," explains how to set this amount for individuals. Use the buttons in the lower-left corner of the tab to designate whether statements are printed by last name or zip code.

## telephone preference



The Telephone preference stores your dialing method and dialing prefixes. The Dialing Method radio buttons determine whether clicking one of MediMAX's dial icons sends the phone number to your computer's speaker for telephone transmission or to your modem. To use this feature effectively, you may need to purchase a telephone handset that connects to your computer, although some phones are sensitive enough to dial the number if they are simply held near the computer's speaker when you click a dial icon.

Create up to four prefix numbers in the fields provided. For example, you might enter the number 9 in the Prefix 1 field if you need to dial a 9 before accessing an outside line. Another frequently used prefix is 1 (or 9, 1) for long-distance calling. If a pause is required at any time during or after a prefix, enter a comma. Each comma represents a one second pause.

When you click a dial icon, Prefix 1 is used unless you are simultaneously pressing your keyboard's Shift, Option, or Control keys. Press Shift while clicking a dial icon to use Prefix 2, press Option while clicking a dial icon to use Prefix 3, and press Control while clicking a dial icon to use Prefix 4.



# preferences

## windows preference

The Windows preference controls how MediMAX's window-centering feature works. Double-click a title bar while pressing the selected keyboard key to move any MediMAX window or dialog box to the center of your screen. Your choices include Command, Shift, Control, Option, and None. If you select None, you don't need to press anything; just double-click a window's title bar to center it.

If you use Apple's WindowShade control panel, please make sure this control panel's keyboard setting does not conflict with your MediMAX Windows preference setting.

